

NTG ALLIANCE

COUNTRY INTERVIEW REPORT

THE NETHERLANDS

Authors:

Dr. Dineke Koerts, Dr. Corné Dijkmans
Breda University of Applied Sciences

May 2019

Table of contents

Background

Theme 1: NTG Skills sets

Theme 2: The future of tourism

Theme 3 : Digital skills

Theme 4: Environmental management ('green') skills

Theme 5: Social skills

EXTRA



Co-funded by the
Erasmus+ Programme
of the European Union

Background: A general overview of the Next Tourism Generation Alliance project, and the number of interview participants per subsector in this country report.

The **Next Tourism Generation Alliance (NTG)** is the first European partnership for improving a collaborative and productive relationship between education and industry, funded by European Union. The NTG Alliance has partners from 8 countries (Spain, UK, Hungary, Netherlands, Italy, Bulgaria, Germany, Ireland), and will provide employees, employers, entrepreneurs, teachers, trainers and students with a set of Core NTG modules in digital, green and social skills.

Goals of the NTG Alliance are:

- To establish a Blueprint Strategy for Sectoral Skills Development in Tourism to respond to the fast changing and increasing skills gaps in digital, green and social skills sets;
- To define a scalable mechanism and model for sustainable and digital curricula between the industry and education providers at regional, national and European level;
- To create transformative cooperation in five key tourism sub-sectors: hospitality, food and beverage operations, travel agencies and tour operators, visitor attractions and destination management;
- To develop, deliver and test Next Tourism Generation (NTG) Skills Products for professionals, trainers, students, university tourism departments, local authorities, companies to respond to the fast changing and increasing skills gaps in digital, green and social skills sets.

Should you wish to know more about the Next Tourism Generation Alliance project, please visit www.nexttourismgeneration.eu

For getting involved in the project (as a community member, affiliate partner or associate partner), please visit nexttourismgeneration.eu/contact/

Sample

Number of respondents interviewed for this report: 30

- Tour operators / travel agencies: 7
- Destination management organizations: 5
- Attractions: 6
- Accommodation: 7
- Food & beverage: 5

Theme 1: NTG Skills Sets: A summary of respondents' ideas of current skills needs (green, social, digital), current shortage of skills, current training provision.

Tour operators / travel agents - current skills needs, skills shortages, current (access to) training provision in relation to skills sets:

Current digital skill needs: digital skills AND knowledge of technology are needed, combined with data analytics, SEA, SEO, business intelligence; application of AR and VR; content management; Office (including Excel and PPT); CRM; social media management, **podcasts**, website design, using booking and reservations' systems.

Quote: "we work with 'building blocks' and clients plan and book their entire holiday on our website, via mobile phone or email so staff need good digital skills, know how to provide on-line service and be quick. Facebook, Instagram, content analysis for a clear website, good photos, online blogs, monitoring of online performance, Google Analytics to see how many people visit our website, how long they stay on our website; CRM systems, different systems for flights, customer information etc." (tour operator/travel agent, nr. 2)

Current skills shortages: data analysing competences; website development skills, data analytics; business intelligence; big data skills; skills related to applying technologies such as AR and VR; **mobile conferencing**.

Training provision: Interviewees mentioned a broad range of in-company trainings, ranging from using flight reservation systems; commercial training (phone-calls); on-line training for sustainability (animal welfare; for tour guides and managers; child-sex tourism and how to avoid it); team-building; internal communication; Excel; training in efficiency and effectivity. One company has a **certified tour leader training programme**.

Modes of internal training provision: Webinars; newsletters; mentorship for young professionals related to skills development; case-based problem-solving; masterclasses.

Quote: "We have a WhatsApp group on sustainability: we use it to create competitive games: making it fun to do; educative tool; knowledge of sustainability, responsible tourism". (tour operator / travel agent, nr. 4)

External training: on safety and security issues; collecting relevant data; creating / executing automated real-time marketing campaigns; creating dashboards to visualize data to detect/improve areas; information on destinations.

Destination Management - current skills needs, skills shortages, current (access to) training provision in relation to skills sets:

Current digital skills needs: all employees need **digital skills** which are becoming more important all the time and are seen by some as **the most relevant skills** for DMO staff. Skills are needed for **data-driven marketing** and being able to measure results of campaigns. This also applies to skills for, for example, developing and working with **chat-box functionalities** with the use of AI to guide visitors in a more personal way and provide a better experience in the city.

All staff also need to **know about social media**, also those that do not work with them on a daily basis. Also needed are being able to **work with and manage social media**; designing and up-dating **websites**; **data analytics**, **understanding algorithms** and developing strategies based on data gathering; e-marketing (publisher); combining human skills with digital skills (AI); privacy related to gathering data.

It is also very important to keep up to date with developments in **AR, VR, beacons, QR codes** et cetera. While a DMO is not necessarily an innovator, it should be in the know about such developments and tools as these will impact the destination.

Current environmental skills needs: these are not required.

Current social skills needs: **hospitality / service skills** are still very important in this sector. One interviewee mentioned the importance of **broad, general skills** such as being able to **share** (knowledge, ideas) as well as **empathy, openness and willingness to learn** from colleagues.

Lacking are skills related to languages, AI, data analytics, VR and AR, creativity, designing (video) content, creating unique packages for customers and writing skills. *Quote: "Things used to be less rapid, now we want to tap into a trend, and we need a video now. Or an event, it needs to be launched, almost on the same day! It is then necessary for us to have this capacity (creating video content and editing) in house". (DMO, nr. 1)*

Training provision: in-company training for language skills; writing SEO proof texts, and other topics related to on-line content; masterclasses on how to receive Belgian and German tourists; hospitality training (including online reputation management - one must know how to handle a positive and/or negative review; in this respect **digital is also social**).

Outside training: one interviewee referred to online tutorials and webinars for up-dating digital skills.

In one DMO, each staff member has a personal budget for education of 1,000 Euros.

Attractions - current skills needs, skills shortages, current (access to) training provision in relation to skills sets:

The main problem in this sector is not so much a lack of skills but **a lack of staff**: people willing to work in the service industries are difficult to find. The general expectation is that this shortage will only grow in the future.

Current skills needs and shortages: **Hospitality / service skills** are lacking or falling short in many companies. Putting the consumer and his/ her wishes first (instead of the company's products) is something that many (especially small) companies in this sector have not yet incorporated into their DNA. In this respect, the sector is definitely lagging far behind the tourism and hotel sectors.

Training provision: In-company training is provided in the area of **digital skills** (mainly operating in-company systems such as for billing and reservations) and **language skills** (mostly German).

One attraction (holiday park) provides in-company training for hospitality and **etiquette / manners** (for all new staff); **a pro-activity training** (to prevent irritation from developing into complaints); **setting the right example** (the idea being that if (senior) staff show exemplary behaviour this will be copied by new staff members); communication (only for those in marketing and management).

One organisation's core business is **providing training for the sector**. These courses cover a wide range of topics. Some examples: hospitality in general; basic cleaning skills; becoming an instructor for aqua sports; HR skills; German language skills; dealing with aggression; communicating with elderly people and many more.

Food & beverage - current skills needs, skills shortages, current (access to) training provision in relation to skills sets:

The main problem in this sector is **a lack of staff** - it is very hard to find (young) people willing to work in F&B.

Current digital skills needs: a certain level of **digital skills** is required in order to work with computers and tools like iPads for making reservations or, for example, cashier and reservations systems (like Opera and MICROS hotel management & booking systems for hotel restaurants). Although in-school training for these kinds of systems is seen as an asset, most interviewees (also in the accommodation sector) think that learning to use such systems can be done by in-company training and does not pose major problems for people with basic digital skills.

Also mentioned: being able to work with and manage **social media**; designing and up-dating **websites**; **desktop publishing skill**; **data analytics and database skills**.

Current environmental skills needs: these are not required when hiring staff in interviewed companies.

Current social skills needs **hospitality / service skills** are the most important skills here. One interviewee talked about skills in relation to **different generations** (generation X, Z and millennials). Generation X will remain highly influential in working environments for the coming twenty years. In politics, lobbying but also in general management, this generation is challenged to bridge the gap between their generation and the millennials and their skills. Millennials, or young professionals, can learn from them when it comes to topics like vision, business strategy and decision-making. The challenge is, however, **to work together** on this and this means that generation X must be flexible and willing to teach and share but also open to listen. Millennials must be willing to learn and ask questions while at the same time-sharing insights into their own generation: the future consumers. **Facilitating discussions by bringing generations closer, is the basis for skills development in the future.**

Lacking are skills related to AI, data analytics, Google analytics, VR and AR.

Training provision: this ranges from in-company training for service skills and team building to external training in branding (how to position the company), website content and management, digital conversations with consumers and database management.

Accommodation providers - current skills needs, skills shortages, current (access to) training provision in relation to skills sets:

Current digital skills needs: using relevant software (hotel & hospitality), using video equipment, website development skills, social media skills (monitoring online behaviour/reviews, analysing data). For the online booking platforms ("Digital skills are part of our DNA"): Office; Word Press; social media skills; creating visuals, In-Design; Google Analytics; SEO, being able to work with Google drive, different online software systems such as Guesty (Airbnb Property Management Software), Monday (team management software), and Wishbox (a guest experience management system, using smart automatic tools and wizards to accompany guests in their own language from initial booking until the check-out). The ability to **think for oneself, creativity, seek information, and curiosity.**

Current social skills needs: The main problem in this sector is **finding staff** in the first place; the next problem is **keeping them**. People do not want to work 24 hour shifts anymore, and **providing service seems increasingly difficult** for young people (see also below social skills). There is a **huge lack of service skills and interpersonal skills**: relating to other people outside of one's own circle of friends, knowing how to have a conversation, and understanding other people's needs seems to be increasingly difficult for young people. Quote: "*Young people today are quite averse to hierarchy, they do not want to work full time and are mostly not suitable for a service-oriented profession*". (accommodation providers, nr. 3)

Skills shortages: AI, data analysis (tools), Google analytics, Virtual Reality.

In-company training is provided for: use of management systems; hospitality and social skills; German; team building; leadership skills.

External training is used for: data management; management of operating systems (booking); HR systems; creating user-friendly programmes.

Theme 2: The future of tourism. A summary of respondents' ideas of tourism and the tourism industry in general and his/her company in particular in ten years' time (2030).

Tour operators / travel agents: what will tourism and the industry look like around 2030?

In every sector the same trend is visible: **the world is changing faster than any company**. The best way to prepare for the future of travel is by learning and internalizing **general skills, instead of specific knowledge**. Professionals must learn how to **listen, to be agile and flexible** - these are 21st century skills. The focus will shift from "jobs" and "professions" to learning and developing **skills**.

At the same time, work and life are merging **with time becoming a scarce commodity**. A more holistic approach to "time" is appearing with professionals looking for smart combinations such as working and traveling at the same time for example. Many freelancers are very skilled in planning and organizing their work and private life in a smart way; for people with flexible or temporary contracts, **communities** (of individual professionals) are becoming more important. An example is the individual travel agent, who profits from working together with tour operators and/or suppliers but also has a lot of freedom in terms of time and approach. **Games** will become increasingly important.

Destination Management: what will tourism and the industry look like around 2030?

In general, DMOs are committed to generating economic growth and creating welfare and prosperity for the local inhabitants. Interviewees expect that numbers of visitors within and to the Netherlands will continue to grow. Considering this upward trend, DMOs consider creating and maintaining a good **quality of life for their residents** as the main priority. This means that attracting more tourists is not always a priority; attracting different types of tourists; focus on quality and diversity or on tourists that match the DNA of the place are sometimes more important. There must be **a balance between visitors, residents and businesses**. That triangle - in balance - is essential for a strong city or region. However, supply and demand are changing all the time, so one has to be on top of trends and developments and come up with good concepts. **Conceptual thinking** is key for the future of tourism.

One interviewee mentioned that **new laws and more restrictive regulations** regarding, for example, AIRBNB, shops and traffic will be crucial for a well-balanced city.

According to one interviewee: *"the interests of the local inhabitants are and will remain our priority; you cannot have a sustainable form of tourism without putting the local people first"* (DMO's, nr. 3). For this, **marketing** is extremely important; marketers need to try and attract tourists / visitors that match the DNA of the city and the local inhabitants; this is quite challenging but also very important. Together with local partners, they also try to develop attractions that match the city.

DMOs are facing many changes and creating **a lifelong learning environment** is crucial. DMOs will move away from simply providing information (which visitors can access themselves through the internet) to **providing inspiration and experiences** for visitors; helping the customer to make sense of the ocean of information on

the internet and coming up with personalized and relevant inspiration will become one of the focus points. Another aspect of the changing role of DMO's is that they are moving away from being a communication partner for stakeholders to **providing advice** on how to attract (new) target groups, or younger audiences and businesses and being **a source of knowledge**. In the future, clients will pay less for marketing and awareness campaigns but more for **consultancy and knowledge**. Becoming **a centre of knowledge and inspiration** will be crucial for DMOs which will increasingly provide inspiration, trend reports, and advice to policy makers.

One interviewee stated that the organization had recently undergone a restructuring. Three main pillars (**skills-areas**) for the future were formulated: **knowledge and innovation; relation management; and project management**. Instead of being a multi-talent, employees should be **specialised** in one of the above-mentioned pillars but should work (and learn) together with a **lean and mean approach**.

One interviewee also mentioned the following developments as being influential for the future of tourism: International visitor numbers will continue to rise with **more tourists originating in BRIC countries**, which means that destinations will receive more "one time only" visitors. **Demographic changes** will see more elderly people having free time to travel and the ability to travel longer, both in domestic and outbound tourism. Younger people will focus on all possible opportunities for travel but mostly in outbound tourism. Tourism within the Netherlands will change as well with people want shorter experiences.

Attractions: what will tourism and the industry look like around 2030?

All interviewees envision **growth for the sector** in general as well as for their own companies / organizations (if not disrupted by economic and political events). More people will spend more time outside of their own homes: a short break with family or friends or a day out with the entire family in a relaxing environment and some interesting experiences. They also see more international visitors making their way to the Netherlands and their attractions are likely to benefit from this trend. However, since competition is also growing, it is very important to develop a sound strategy for the future (expansion, internationalisation, growth). Standardization and automation are important for this: when processes and procedures are standardized and automated, they are easily transferable to other locations and attractions. The main problem, however, will remain: **a lack of staff and people willing to work in the service industries**.

Guests are asking for increasingly **higher levels of experience, customization, hospitality and sustainability**. Companies have to deliver in these areas if they want to remain relevant.

Jobs will be less specific and more general; a person who works at the reception will alternate his/her activities with, for example, supervising the swimming pool or work in retail. In all these tasks, putting the **customer first / service orientation** will be the most important skill. This connects to the trends towards **blended concepts** (which was also noted by DMO's): one service point for reservations, tickets, retail, access to experiences (downloading interactive tours for example) and so on.

Digitalisation and automation will increase and continue to impact the sector. One of the main areas of impact is in the automation and interconnection of **systems and processes** (booking, check-in, opening gates, billing, stock control, maintenance and repair). This will also enable companies to become **more personal and meaningful for their guests**.

According to two interviewees, **mobile phone applications** will improve the customer experience; customers can use their phones to make reservations, open gates and doors, access information on activities and book them, report a malfunction and more.

The use of AR and VR will increase: one holiday park already has an augmented reality scavenger hunt and interviewee expects this kind of entertainment to grow in the future. In developing this, they cooperated with

an external company. The museum has so far refrained from implementing digital signs and/or interactivity on the museum floors since they want everything to be “real”. However, interviewee expects that virtual and augmented reality will play a more prominent role in the years to come.

All these interconnected and automated systems and process will generate enormous amounts of data. For employees this will be one of the main challenges of the future: **being able to maintain an overview, being able to analyse and interpret these data and put them to use.**

Attractions and on-site accommodations will be smarter than today. AI powered devices will know when the accommodation is empty and put all electronic and heating systems into sleep mode (but still turn on the heating when it freezes or run the taps once a week for cleaning). When guests are repeat visitors, these systems will know guest preferences for room temperature, light and so on.

Staff will still be important in 10 years’ time. Even if robots will replace the persons scanning the entrance tickets, for example, there will be some human person around with other tasks like welcoming guests, answering questions, trouble-shooting or playing host. One interviewee mentioned a recent report on digitalisation and robotization in the attraction sector; the main finding here was that the future of work will revolve mostly around those **skills that are unique to the human brain (the two most difficult to “robotize” being social intelligence and originality / creativity).**

Quote accommodation park: *“Staff will still be around, especially in HORECA and entertainment; the dishes will still be brought to the table by humans; entertainers who organise the “mini disco” (for kids) and the person who facilitates the bootcamp will not be replaced by robots. Human contact and service will still be highly important”.* (Attractions, nr. 2)

For the museum, **diversity and inclusivity** are major focus points today and are expected to become even more important in the years ahead because the museum needs to remain relevant to the growing numbers of international visitors and to new generations of Dutch people with very diverse backgrounds. The role and function of museums in society is likely to evolve more into the direction of **education and wellbeing**: art as a means for people to expand their horizons, to adjust their worldviews and to make them feel good (enjoying the beauty of art; understanding other perspectives; experiencing something special).

The museum will also expand its **outreach programmes** to suit the need of the diverse audience: sending docents to schools or old people’s homes; **digital outreach** (digitalizing the collection so more and more works can be viewed on-line; YouTube video’s highlighting certain elements of the collection).

One interviewee pointed out that the skills being researched by the NTG project are actually **today’s skills**: sustainability, being able to use digital devices, online marketing, social media, customer orientation - these are all relevant today. *Quote: “we actually do not know what 2030 will bring us in these areas; AI, robotization and automation will have unknown impacts; maybe social media will have been replaced by something else, for example”.* (Attractions, nr. 7)

Food & beverage: what will tourism and the industry look like around 2030?

The F&B sector will still **rely on humans** and **excellent service**. For the high-end restaurant: people visit the restaurant in order to experience a story, a high standard service and high-quality food.

Digital tools (reservation and ordering systems) will generate **more guest data**. This will enable staff to create **more personalized experiences**: for example, if a guest arrives early, employees can ask the guest whether he or she liked the 3-course meal last time and if he or she wants to try another type of menu.

According to one interviewee, the main skills of the future will be **optimizing the personalization of a guest's experience, based on digital data and human service.**

However, interviewees noted **a shortage of staff** which will probably increase in the future. **AI and robot technology** can provide solutions here. These solutions lie not necessarily in food being served by robots but in, for example, **changes in the processes of ordering and payment.** By using tablets for food selection, ordering and immediate payments, restaurants in China and Japan have reduced the amount of staff. This system of ordering also results in fewer complaints: customers are responsible for placing their own orders resulting in fewer misunderstandings and miscommunications. If customers still need staff, they can summon them via a button on the table; staff are equipped with wearables for this purpose. Also, in the kitchen, AI may provide solutions for labour shortages. Several restaurants have **automated some cooking procedures**, resulting not only in increased labour productivity and reduced labour costs but also **reducing food waste.** Maybe, at some point ahead, being served and advised by humans can becoming an USP for small restaurants that are unable to invest in AI.

One interviewee mentioned that a universal change ahead will be the **generational change between 2030 and 2040:** consumer generations will change; millennials will start to occupy senior positions while the first representatives of generation Z will become active in middle management positions. This means that in F&B and in tourism in general, **stakeholder management and skills related to that** will become key: personal attention, adding value as a business, innovation and always knowing what is relevant to consumers will be crucial for survival. **Creating ambassadors** will be the most important factor for being successful as a business. Having ambassadors and a successful stakeholder management approach will bring companies **insights** into where and how to innovate in terms of products and services. The future is about being adaptive to the market.

Accommodation providers: what will tourism and the industry look like around 2030?

The world today is very volatile (politics, economy) so it is difficult to say what will happen in tourism and hospitality in the next 10 years. Also, digital transformations are so fast that **major disruptions** are likely to happen in the years ahead. According to one respondent, **block-chain** technology will most likely connect supply and demand in a more direct way, cutting out the "middle-man".

Right now, the trend is towards **more travel and more hotel bookings**, both for leisure and business purposes. In fact, numbers of travellers are growing so fast that all accommodations interviewed are having problems keeping up, especially where staff is concerned for. The international chains are expanding fast and takeovers of small hotel chains by larger ones are happening daily more or less; helpful for the expansions of the larger chains is also the increasing regulation of AIRBNB in cities like Barcelona, New York, Amsterdam, and Paris. So, growth wise, the immediate future looks bright; the downside is **the increasing shortage of staff.** There is **a great need for people with a vocational background**, but it is very hard to attract them. Large chains have an advantage here because of brand name and reputation but the situation for smaller companies is dramatic right now.

The future will be AI controlled. The ongoing integration of systems and processes (back- and front office, reservations, pricing, billing, check-in and so on) will make it possible to **increasingly personalize offers** and come up with relevant propositions for customers. **Flexible daily rates** based on capacity and demand and realized through AI will be a reality soon. **AI will also increasingly influence the recruitment process.** **Data-analysis** is key for these processes. Already, it is possible for those guests who prefer this to come and go in most chain hotels without speaking to a human; they can check in with the hotel app which will also open their room as well as check out and pay online with the bill being sent to their e-mail address. However, most guests still prefer **human interaction** at some point. And even with the current shortage of staff, interviewees do not

think it is very likely that robots will replace humans when it comes to providing service - robots delivering the food to the table or replacing reception staff is not going to happen anytime soon in their opinion.

AR and VR will become more important. Already some hotels are creating a short video which they send to guests prior to arrival showing them the room they will be staying in and other facilities.

Jobs will be more flexible and become more fluid: strict boundaries between jobs will disappear. Staff will need to be able to work in different departments, at different levels and use different tools and applications. Educational background will therefore become increasingly irrelevant **but hospitality skills and customer orientation** (which are also relevant for banking, airlines and many other sectors) will remain extremely important. **Life-long learning skills** will be crucial for everyone as well as being **broadly educated**. With such skills, people will be relevant for more than one sector and able to switch between jobs. The ability to **think out of the box** was rated as one of the prime skills for the future.

One interviewee commented that competences that are most relevant for the future of tourism and hospitality are **social competences** and **meta competences**, related to **adaptability, flexibility, willingness to learn, openness, developing others, service mindedness, analytical skills, critical thinking and digital skills**.

Theme 3: Digital skills. A summary of the digital skills rated as the most important in ten years' time by interview participants.

The respondents working at tour operators / travel agents consider the following digital skills as the most important in ten years' time:

Digital skills are key, both today and in the future. However, it is generally not considered useful to study very specific digital tools because they tend to be outdated when you leave school since technical developments are evolving that fast currently. So **digital versatility** (being versatile with apps, tablets, Office, Googledocs, Office 365, social media, websites, Skype, **podcasts, headphones, emails and live chats with customers**) is important but also more **general skills** such as **conceptual design thinking, analytical skills** and, especially, **creative thinking**. **Future digital skills** are more about **understanding the underlying concepts** in order to be able to decide what kind of digital tool would be helpful to solve a problem. **The human factor** will still be relevant though and a good balance of digital and human skills remains crucial in the coming years.

For tour operators and travel agents, it might be necessary to evolve from being a traditional e-commerce organization **to a high-tech data driven organization** in order to survive and provide the best customer journey for each target group.

The general feeling is that - except in the technology-based companies - most staff members **do not have to be digital specialists**, know how to build a website or how to construct AI powered systems as this will mostly be outsourced in small and medium sized companies. However, staff should **understand the underlying concepts of AI powered systems and technologies**. **Data analysing** competences are definitely needed as well as business **intelligence** and skills related to digital technologies such as **AR and VR**. *Quote: "one should be able to use and understand how it works. It's not efficient if you only see the front end – you can type in some numbers, but you need to also know the processes behind it. So, you need an understanding of where the data comes*

from, how it is produced? What is it measuring? Analytics and KPIs? Booking numbers? Therefore, understanding data is one of the biggest challenges". (accommodation providers, nr. 6)

Regarding websites, development and maintenance, creating (individualized) content and content management as well as monitoring website traffic were mentioned.

The big question is how **social media will evolve in 10 years' time**. Some respondents mentioned that the familiar social media like Facebook are becoming less popular and that **new platforms** will definitely appear.

Marketers will need to know about **growth hacking** (experiment driven marketing to find the most effective way to boost growth for the company which is not only about technology).

At the ICT based on-line platforms the situation is somewhat different. They are essentially tech companies where software is developed so they need not just digital but also **programming skills, language skills (writing content) as well as skills related to imaging and visualisation**.

Other skills mentioned: skills related to the customer journey and touch points; understanding algorithms; channel integration; creative tech-and web designers (UX); voice technology.

The respondents working at destination management organizations consider the following digital skills as the most important in ten years' time:

All staff need to have digital skills and be able to work with computers, tablets, apps, Office, GoogleDocs, sharing documents, social media and so on. But this is not a problem with the younger generation. **Their digital skills are up to standards.**

All **on-line marketing / e-commerce skills** are becoming more important. However, many organizations, attractions and accommodations in a destination can and will do their own marketing. DMOs can provide contextual information on what is happening in the region and look for digital tag-ons in existing campaigns and platforms created by stakeholders. It is not necessary for everyone to be a specialist in on-line marketing or social media; strategic marketers could share trends and developments with colleagues to keep them up to date. At the same time, marketing is changing and asking for different skills: it is becoming more **targeted, more data- and trends based, adding intelligence to marketing communication**.

Small organizations are often lacking a dedicated marketing professional as well as time to learn digital skills (which are now often outsourced). According to one respondent, a DMO should be the provider of knowledge here and convince their stakeholders that it is important to take courses or outsource this if they want to "sell" the region or area.

Several interviewees mentioned **writing skills** as being important. On-line content also needs to be written; writing content for applications, a pitch, campaigns and so on is still very much needed (but also becoming more and more problematic). Quote: "They require a balance between informative and commercial, attractive and to-the-point which young people seem unable to do at the moment Schools could pay more attention to this skill" (DMO's, nr. 3). Writing on-line content also should be **SEO proof. Text, video and photography** are communication tools that are of high importance but still not that much of a priority for entrepreneurs. Also, educators in F&B, leisure, hotel and accommodation management should be more focused on such skills in relation to marketing.

Community management (stimulating the network of regional/local entrepreneurs to be digitally active) will become more and more important as well as providing assistance to stakeholders when it comes to creating a wider audience on TripAdvisor, Booking.com and so on.

The respondents working at attractions consider the following digital skills as the most important in ten years' time:

In general, most interviewees do not see a huge problem in the area of digital skills. Younger generations are **digital natives**, so there is not really a problem with basic computer skills, using laptops, tablets, smartphones, apps and the most in-demand software. The museum has provided all guides with an I-pad, to use during tours (also to reduce printed paper). With AI becoming more integrated into devices and applied in industries and society at large, it will become easier to work with automated and digitalized techniques and **hardly any special skills will be required** for this. According to one respondent, **the most important future skills** in relation to digitalization **will be curiosity and the ability to ask (the right) questions**. Quote: “*A critical attitude, knowing the basics of politics and what is going on in the world are also very important. Students today do not seem to know anything about how politics operate, what the responsibilities of the government are, what the “trias politica” as such is - quite worrying. I recommend watching Yuval Noah Harari, Homo Deus. A brief history of tomorrow in this respect*”. (Attractions, nr. 3)

One interviewee considers digital skills one of the key areas for upgrading and upskilling in **smaller companies**. The sector, and again, especially smaller companies are lagging far behind tourism companies and hotels regarding the use of big data, on-line marketing (in many small companies still non-existent today) and social media management (review management, use of influencers, blogs & vlogs). So here, everybody will need to have a **higher level of skills than today**, also people with a vocational training background. On the positive side, this interviewee also sees that skills in this area are slowly improving with younger generations making their way into this sector.

A difference with today is that **everybody will need to have such digital skills**. Now, tech staff, housekeeping or gardeners are not always required to have digital skills. However, with the increasing interconnection of systems and processes, also tech installations are mainly approached through the Internet: if the air-conditioning has a problem, staff will launch an app to locate and possibly repair the problem.

Being able to **update websites and other on-line media** is seen as important - in interviewed companies there are always a few people able to handle this.

Also, marketers now entering companies need to have e-marketing skills; this is not a future skill; it is also not considered problematic by interviewees. But what will be needed in 10 years' time?

However, to find **data analysts** at level of University of Applied Sciences or higher is already problematic and this will probably become a greater problem in the future when the need for such specialists is even greater. To maintain an overview of all processes and data, staff will need more **analytical skills** than today.

One interviewee remarked that **specialists** in the field of automation, financial management, marketing, or gardening will remain very important; and they will need digital skills in their specific fields of expertise (digital marketing, programmes for financial management and so on) but they do not need to have a tourism education background.

Some interviewees point out that new technologies and disruptive applications can appear more or less overnight. Therefore, **self-learning skills** and **adapting oneself** to new technologies will be crucial in the future.

Most companies hire **other companies** for developing applications, AI powered systems and so on.

Social media skills are of increasing importance and there is a consensus that all staff will need to know about the **effects** of social media posts and how to **manage these**; knowing **where** to look for comments and how to respond is very important; **maintaining an overview and analytical skills** were frequently mentioned in this respect. Negative comments cannot be left floating in cyberspace for hours without responding. So, this means

that also during the weekend and evenings, social media have to be monitored and responded to. While most young people have plenty of knowledge of social media, business communication via social media is different from communicating with one's friends. There is a huge **lack in business communication skills for social media**. Quote interviewee holiday park: *"The younger generation is fast, that is not the problem, but they often do not take the impact of their reactions into account and use unsuitable language"*. (Attractions, nr. 1)

Writing content and announcements for on-line and social media is another problem area. It needs to be short but catchy, match the target group, entuse people and contain facts. Most young people cannot do this.

Several interviewees mentioned dealing with the press (both online and offline) as becoming more important. Quote interviewee employers' organization *"customers will turn to (local) press or social media if they feel their complaints are not heard; currently, many companies, especially the smaller ones, are not capable of managing press relations well"*. (Attractions, nr. 5)

All interviewees see AI and robotics becoming increasingly important in their company but mainly for gathering and interpreting data such as recognizing guests when they are on-line and coming up with relevant (tailor-made) propositions for them. They do not see robots replacing humans at service points or in bars and restaurants in the near future.

The respondents working in the accommodation sector consider the following digital skills as the most important in ten years' time:

Basically, all staff (today and in the future) need digital skills and know how to work with tablets, apps, booking systems and so on. They need to feel comfortable with such devices and have the skills (**self-learning skills**) to learn to work with new applications. **Everyone** will need some degree of **digital fluency**. Front desk (and other) staff needs to be able to work with some sort of property management system; sales staff with CRM cloud-based system (such as Sales Force). For the younger generations of digital natives this is not considered a big problem.

Housekeeping, tech & maintenance also are increasingly working with apps and online services. Housekeeping apps are connected to check-in and out, for example, enabling staff to clean those rooms that are needed first; or to manage stock (of soap and so on). Technical and maintenance staff need to be able to work with ICT, computer programs, apps, and tablets. Everything is software based and most installations are already connected to the Internet (and more will follow): television, heating, lighting, air conditioning. This means that technical staff needs to be able to solve problems online with apps and laptops. There will always remain some "old fashioned" maintenance (woodwork, carpentry, repairing taps) but actually less and less. All systems (CRM, PMS, marketing) are in the process of becoming integrated into one system (and in some hotels already are) which will manage everything, not only front desk but also sales, F&B operations, housekeeping and maintenance, multichannel distribution, revenue management and so on. Developing such AI processed systems, applications and tools is outsourced to tech companies.

At management level, **collection of data** and **data analysis** is increasingly important. The job of the general manager will change a lot. While the core of this profession still is making sure that guests have a wonderful experience, the use of data and digital tools enables the manager and his/her team to learn more about guests and provide better service.

On-line marketing, e-commerce, social media skills are **not future skills but those of today**. Today, it is simply not possible to operate a large hotel chain without all these skills; small businesses will either have to catch up very quickly or they will disappear. In smaller companies, designing, maintaining and creating content for websites is seen as important (being able to work with Adobe Creative Cloud, Photoshop, and DTP were mentioned).

AR and VR are on the rise, especially to add some “experience value” to the accommodation. One interviewee talked about an interactive wall in the hotel lobby on which nearby sights and attractions are displayed in an attractive “cartoon style”; guests can access more information by scanning the QR code next to the cartoon. AI and VR are offering possibilities for providing guests with a personalized video before arrival and visualizing the check-in, rooms, breakfast and so on.

Despite all these innovations, the hotel sector remains quite traditional: sleeping, taking a shower and eating are and will remain the core business.

Digital skills need to go hand in hand with soft skills such as: **adaptability, flexibility, openness to innovation and self-learning skill**. These are all crucial, both for the future in general and for understanding and working with digital tools. One interviewee gave the following example: Revenue management is often seen as competence (in education) but is already entirely digitalised in many companies. While the basic principles of revenue management still need to be understood, many of the tasks belonging to this specialization are executed by technology. So, the focus on what a person in charge of this and other disciplines needs to learn (instead of knowing everything) will evolve and change. This means that a general digital fluency together with the above-mentioned soft skills will be much more important than in-depth knowledge of revenue management.

The respondents working in the food & beverage sector consider the following digital skills as the most important in ten years’ time:

Digital skills are a must have now and in the future. However, **which** digital skills will be important in ten years’ time is very difficult to predict. AI and automation will only increase. On the one hand, this will facilitate the use of digital tools and applications. On the other hand, **the digital landscape evolves so quickly** as do the opportunities for engaging with customers. This makes it quite hard to pinpoint the exact digital skills that will be needed around 2030. However, according to one interviewee, digital skills have in common that they are mostly about **asking questions** (why, what, why not), **analysing and self-learning**: is this tool useful for the company or not; should a new tool be implemented or not; and then starting to use it. The next generations will be the ones who must make such choices and as digital natives they will be prepared for this. For older generations coping with all these changes and new tools can be quite difficult. Here, **cross generational cooperation** on the types of digital tools or skills that are needed within organizations will become important. **Life-long learning skills** will also be key to survive in the fast-changing digital landscape.

Also, on-line social and hospitality skills will be important. The philosophy remains the same: **on- and offline, guests should be treated in the same way.**

Other interviewees mentioned **skills for data collection and analysis** (from reservation and ordering systems, for example) in order to optimize the service for the guest. However, privacy laws will affect what can be stored and must be deleted. In general, digital tools for documentation, creating new menus and calculations are efficient, time-saving and environmentally friendly.

Also mentioned were **knowledge of AR, VR and robotics; content management; website design/development; booking and reservation systems.**

Theme 4: Environmental management ('green') skills. A summary of the environmental management skills rated as the most important in ten years' time by interview participants.

The respondents working at tour operators / travel agents consider the following environmental management skills as the most important in ten years' time:

Also, in this sector the main idea seems to be that there are **no specific environmental or green skills**. Behaving in a more sustainable way and choosing the most sustainable options will be the norm in the future.

Awareness, values and a holistic approach (no distinction between work and private life regarding sustainable practices) are most frequently mentioned here. Most respondents are of the opinion that the sector should **not look away** from the negative impacts of tourism (pressure on the environment, on cultures or overtourism). Airlines who still offer tickets for 12 euro's, cannot exist in the future. However, climate and climate change, for example, cannot only be explained in the context of tourism and traveling and managing limitations in this respect is also important.

Some concrete environmental skills that were mentioned: Getting the office to reduce and manage waste, sewage, electricity; recycling; knowledge of climate change; getting staff members involved in all these processes; create opportunities for employees to start up sustainable projects; include statements in contracts with business partners about sustainability; give preference to sustainable partners.

Perhaps one of the most important "green skills" will be **daring to engage in conversations on this topic**; for this, **verbal skill** are required to communicate values and to convince. *Quote: "Finding the right words, listen to arguments but most of all practice what you preach and being able to create support within the company, mobilising and organising change and discussion in a passionate way. One must not be afraid that speaking up (which is a skill) is dangerous and can lead to job loss, because one stood up with a strong idea and ideal". (tour operator / travel agent, nr. 6)*

Sustainability is not only about the environment: it is also important to create **positive impact for the destinations** by using locally managed hotels, guest-houses, local agents, drivers and to pay decent salaries. One tour operator focusses on community-based tourism; they work with and listen to the local population. Several tour operators support sustainable projects in destinations visited. Offering **sustainable travel options and forms of accommodation** is seen as becoming more important.

One tour operator focuses strongly on sustainability. They use a **carbon calculator** to explain to clients what the carbon emission of their travel is and the company compensates this. They hold a **Travelife** certificate and won the Dutch Sustainable Travel Award recently. Another tour operator also holds a Travelife certificate.

Several companies already have a person or several persons in charge of sustainability issues; several also offer the possibility to do the Travelife basic training if they are interested; for the person in charge of sustainability this is an obligation. **Awards and eco certificates are helping customers to make green decisions**. The only problem is that they all have different criteria, so which one is trustworthy?

Other tour operators also compensate for CO2 emissions, stimulate direct flights rather than 3-4 flights or taking trains rather than short flights. Within their own companies and offices there is a wide range of measures being taken: not travelling between offices but using Skype or other modes of interaction (video conferencing); no more printed materials; no air-conditioning; organic lunches; using only electric cars (and in the future working only with holiday partners who offer electrically-charged transport possibilities).

While it is obvious for all participants that the environment and sustainability will become increasingly important, some respondents think that **price** is still the first consideration for many clients.

The respondents working at destination management organizations consider the following environmental management skills as the most important in ten years' time:

Currently, no specific environmental skills are needed. The topic of sustainability is, however, considered very relevant by the interviewees. Sustainability is not so much about skills but more about **awareness**. One interviewee mentioned that environmental management should be based on a **values transition**; it is not so much about skills but about incorporating sustainability into our values, so it becomes part of everything that people do and think, also in destination management and development.

According to one respondent, **sustainability is an asset**, like Wi-Fi. It should be in place but is not contributing to distinctiveness so much anymore. The Green Key certificate for hotels is, for example, perhaps a 'nice-to-have' but today only a small group of travellers make decisions based on this. For the masses of travellers, **price** is still the main consideration, and this will continue to be so in the foreseeable future.

Sustainability is not only about going green but also about **liveability of cities and places**. *Quote: "... if your neighbourhood is being run over by millions of visitors, it's not about money; you want to have your neighbourhood back; it's about quality of life: about the cleanliness of the air; transportation mode, safety; cultural opportunities". (DMO's, nr. 1)*

DMO's are aware that travel - and especially air travel - is under increasing pressure. **Sustainability skills** for DMO's are about **preserving a city in balance for future generations and trying to prevent situations of overtourism**; about innovative **modes of transportation**; about how to create **more leverage** when it comes to tourism without increasing the numbers; about making visitors look beyond the most visited areas (also for travel guides). **Promoting sustainable initiatives** (e.g. city walks around the theme of water management or recycling; café's with "green" concepts; art and design dedicated to the environment; cycle tours et cetera) in their cities / regions / destinations is considered important. Hotels, leisure attractions and F&B organizations could showcase the importance of environmental management in this way. This also applies to **souvenirs**: promoting and selling **souvenirs that are produced in a sustainable way**. A lot can still be gained here; attention should be paid to how these items are produced, which materials are used, if they are locally sourced and so on.

Creativity is also an important environmental skill: how to translate a sustainable mindset into communication strategies and (small) solutions for pressing problems. For example, providing large litterbins on the beach with communication to keeping the beach clean.

Certificates, awards and taxes are environmental tools which are expected to be even more important in ten years' time. Eco labels are becoming must-haves for accommodations, attractions, events and even destinations to attract sustainably conscious customers.

Within their own organizations, DMO's pay attention to reducing the use of paper (or printed travel guides), consumption of water, electricity and so on.

The respondents working at attractions consider the following environmental management skills as the most important in ten years' time:

For most interviewees and their companies (4 out of 6), sustainability is very important, especially at management level. At staff level, **no special skills are required**. In fact, sustainability (such as waste separation, energy and water saving, nature education, using local products) **has to be part of the DNA of all employees** (and everyone); it is more of an **attitude** today and not so much a matter of skills; one interviewee explicitly stated that something like this should not hold a place in any curriculum. One interviewee is of the opinions that all staff should be familiar with CO2 emission levels, how they can be reduced and what the effect of

energy saving measures is. One interviewee mentioned that many small companies tend to see sustainability as a threat and as something that will cost money without much immediate benefit. However, a younger generation entering these companies as trainees or employees is increasingly contributing to environmental awareness.

One respondent sees training, especially for staff on the grounds (those collecting the waste, keeping the greens et cetera), on topics like energy efficiency, reducing water consumption, waste management, recycling and composting as very necessary.

At management level, **sustainability is one of the focus points** for most companies; the 2030 energy transition is approaching fast and combined with the approaching end of gas extraction in the Netherlands, the transition to other energy sources is one of the top priorities. Most companies have solar panels installed, one attraction uses electric vehicles only. However, sustainability is more than just energy and emissions: regional involvement is also important - contributing to a healthy region, using local products and not causing problems such as overtourism.

Many sustainability related issues are outsourced to other companies: installing electricity saving devices and solar panels or heat pumps and so on.

Regarding waste collection: two attractions do not ask their guests to separate waste; they prefer to do it themselves. One interviewee is convinced that this process will be carried out by robots quite soon.

The general feeling is that future generations will demand a more sustainable environment, also during their breaks, day outs and holidays, so companies will have to make arrangements for this. *Quote: “you cannot do without sustainable policies, but it has to be authentic and supported by all staff members” (Attractions, nr. 1)*

Quote: “guests eventually will not want to stay in unsustainable parks as they do not want to have a guilty conscience during their holiday”. (Attractions, nr. 6)

Certification is therefore important and supported by many attractions. It is also increasingly important from a marketing perspective and will soon become indispensable. With certification, sustainability becomes a part of the vision of a company. **Green Key** is held by 2 attractions (one Green Key Gold); one has the ambition to acquire Green Key soon, not only to show their customers they take sustainability seriously but also because meetings of the local government are only allowed to take place in Green Key certified hotels / parks. This is an incentive for them to become Green Key certified.

The museum holds a BREEAM certificate (this applies mainly to the building itself). The staff canteen offers sustainable food options and table ware; there are separate waste containers for visitors to dispose of their rubbish.

The respondents working in the accommodation sector consider the following environmental management skills as the most important in ten years' time:

For recruitment, **no specific green skills** are asked by interviewed companies. Employees need to be **aware of and follow company policies and procedures which are conceived at management level**; providing the right example is important and sometimes staff can influence guest behaviour or behaviour of their colleagues. Most - young - people are very aware of the need to be sustainable. There is (or should not be) much difference between behaviour inside or outside the company; it is more a matter of **attitude and awareness, a mindset or intrinsic motivation and not so much of skills**. One interviewee called the environmental debate a hype, a way of getting people to believe they are doing something special, when, in fact, it is something that should be the norm. Also, here, more general skills were mentioned as important for introducing sustainable policies in the accommodation sector such as **openness, curiosity, adaptability and willingness to learn**. To a certain extent

(but not by all interviewees - some companies want to be leaders in this field), sustainability is seen as consumer driven: when consumers indicate that sustainability is an important consideration for staying in an accommodation, then businesses will automatically adapt.

Online platforms indicated that see a responsibility in pointing out eco-friendly options to stay, hang out, travel to or in cities (rent a bike in Amsterdam and make use of the tram and subway, rather than to take Ubers or busses). *Quote: “We have a crucial position in spreading awareness for tourists. We are one the first contacts tourists have in the Netherlands. We rather point out their part in climate change and how to reduce it”.* (Accommodation, nr. 7)

Certifications and eco-labels are powerful tools - they subconsciously get into the head of consumers. Also, for private rentals it is possible to create labels for environmental friendliness (solar panels, type of energy, etc.) that tenants see when they are booking.

One of the large hotel chains considers itself to be an **environmental leader in the industry** and has many corporate responsibility policies in place. Green Key is, according to interviewee, considered quite backwards and far less ambitious than their own goals. Last year, the chain announced it wants to cut its environmental footprint by 50% in 2030 which is very challenging because they are expanding at the same time. They will also double their social impact investment by 2030 (this is mainly about policies promoting diversity, gender equality and opportunities for people with disabilities within the company but also more local procurement).

Both measures are **driven by hotel guests’ booking decisions**: according to a survey among 72,000 hotel guests in spring 2018, **social, environmental and ethical considerations are central to their buying preferences, especially for those younger than 25 years old.**

In order to cut its environmental footprint by 50% in 2030, the chain is putting policies into to:

- reduce carbon emissions by 61%, in line with the Paris Climate Agreement and approved by the Science Based Targets Initiative (SBTi) - this means, e.g., monitoring CO2 emissions daily in individual hotels;
- reduce water consumption and produced waste by 50%;
- remove plastic straws from managed properties;
- sustainably source meat, poultry, produce, seafood and cotton;
- expand existing soap recycling program to all hotels and send zero soap to landfill.

One of the hotel managers mentioned that the hotel (which started operating one year ago) was built on a lean-and-mean concept and according to sustainable principles, with solar panels and a heat pump. For the next ten years this hotel is “futureproof” regarding sustainability demands. It holds a chain certificate (Planet 21) and they are not going to apply for other eco labels. Planet 21 is mainly about the building / hardware: use of eco-friendly cotton sheets, eco-certified soap, shower gel and shampoo and cleaning products as well as separating waste and electricity reducing measures.

One of the other hotels holds a Green Key (gold) certificate - this is also necessary from a marketing point of view since more and more guests demand this.

The interviewee of the mid-size hotel does not believe in certification. Most labels are not transparent and are mostly about politics. His hotel does not and will not apply for Green Key or any other label.

The respondents working in the food & beverage sector consider the following environmental management skills as the most important in ten years’ time:

Environmental skills are **not a requirement** when hiring staff. Currently, these skills do not seem to be a priority because they are not directly related to making money. The impression is that in this sector sustainable practices are to a large extent **customer driven**: customers increasingly have a sustainable mind-set. This means that companies will have to meet their demands and wishes in this field and need to be on top of trends to remain in business. In order to become more sustainable, one interviewee mentioned organizing brainstorming sessions with all staff. Especially the millennial generation cares about the environment. With their knowledge, expertise and ideas, innovative practices can be established.

Some other examples: paying more attention to sustainable transportation (more electric vehicles but also promoting cycling and hiking); promoting local products and procuring local and regional foods. Reduction of food waste, which is also about wasting money, is an area of growing attention.

Theme 5: Social skills. A summary of the social skills (i.e., personal-, communication/cultural-, and diversity skills) rated as the most important in ten years' time by interview participants.

The respondents working at tour operators / travel agents consider the following social skills (i.e., personal-, communication/cultural-, and diversity skills) as the most important in ten years' time:

In the future, **perhaps fewer people will be needed** in this sector. Ten years ago, the notion of booking online was inconceivable, so who knows what will happen 10 years from now?

Today, people are still needed in this business as many clients still want human contact and a personal touch. **Service orientation, (inter) personal and communication skills** are therefore still essential in this sector. **Communication** and **cross-cultural and diversity skills** are needed for dealing with a wide range of customers and suppliers (local agents or accommodation suppliers all around the world), for managing customer relations, and for dealing with complaints. These skills are expected to remain of major importance for the tourism industry: **personal and human interactions to balance the increasingly tech character of the sector.**

Considered very important is **empathy or the ability to really understand the customer, his/her dreams and allergies, or needs and feelings**. The increasing individualization makes that everybody wants to be treated as an individual so one must try and understand what is going on in the individual minds of consumers. And which product or experience they needs. **Active listening skills** are crucial for this as are **“people skills”, the ability to deal with different types of people.** **Life-long learning and self-learning skills** are important to understand and cope with the ongoing changes in society.

Writing skills are also important. How to communicate effectively in **short text** (chat box, WhatsApp) for different target groups - formal (older customers) vs informal (peers).

Sales skills were mentioned, related to commerce and e-commerce.

Creativity and **exceeding customer expectations** are relevant, especially when creating tailor-made holidays (which is still often a human activity). **Product development**, based on developments in the market and in the destination, is of great importance.

Skills of the future are definitely: **being able to work in teams, collaborative skills, sharing of knowledge and insights.** *Quote: “We are a modern 100% agile organization. We have no managers in the company. So agile-team – diverse- open – scrum master – lean are the most effective ones”. (Tour operator / travel agent, nr. 3)*

The respondents working at destination management organizations consider the following social skills (i.e., personal-, communication/cultural-, and diversity skills) as the most important in ten years' time:

By far the most important skills, today and in the future, are **hospitality skills / service orientation / service attitude**: being able to understand the person in front of you, their needs and wishes, and the ability to come up with the right solution / experience / inspiration for this particular person or group. Being able to **ask the right questions, listening and interpersonal skills** are indispensable for this, especially for those working in visitor centres.

Creative skills are a must-have. Quote: *“you need to be able to create a WOW experience for your customers and to be able to think outside of the box in order effectuate customer satisfaction without losing track of the commercial aspects of the job” (DMO’s, nr. 3)*. Knowledge of **lifestyles and how to match these with products or experiences** for the market are also considered very relevant.

Language skills are also rated as important. For this work, one needs to be able to speak several languages: English of course but also German (French and Italian or Spanish would be even better). However, it seems that language skills are decreasing. **Cross-cultural skills** are of great importance, both when providing customers with information and when trying to attract businesses. These skills are also relevant for **tour guides** (these were mentioned a few times) as well as **storytelling skills**. In order to enhance **accessibility** (for those with special needs but also for visitors from abroad) there should be more **working together and more information**.

Collaborative skills and **teamwork** are ‘must-haves’. DMO’s run many campaigns for which **teamwork, creativity, openness to innovation and a spirit of commerce** are necessary.

Other skills that were mentioned: **adaptivity, open-mindedness, eagerness to learn, breathing the city’s / region’s DNA, passion, a sense of humour, a knack for current trends, advisory skills**.

The respondents working at attractions consider the following social skills (i.e., personal-, communication/cultural-, and diversity skills) as the most important in ten years' time:

By far the most important skill, today and in the future, is **hospitality / customer service**. Making guests feel welcome, asking oneself permanently, according to one interviewee, *“who is this customer; what does this customer need; how can this customer feel appreciated and happy” (Accommodations, nr. 1)* and **contributing to a great customer experience** are crucial for success in this sector. For this, **creativity and thinking outside of the box, being able to create personalized experiences and tours** are also important. **Storytelling skills** (both online and “live”) are also crucial for this.

Quote interviewee holiday park: *“making guests feel welcome and appreciated can be a USP in an increasingly digitalised and automated world. This kind of human contact will become more relevant and is also an important part of the customer experience. Other parks also have accommodation, a swimming pool, and restaurant and many are of similar quality. So, if you want to distinguish yourself from competitors, the only option is by providing excellent service and a great experience”*. (Accommodations, nr. 1)

Empathy, understanding **the needs of others** and some **social-psychological knowledge** are important for hospitality and service provision.

One interviewee mentioned **handling complaints and complaints management**, with more demanding and assertive guests (especially the Dutch) who are increasingly aware of their rights, as a skill that will become more relevant. For this, **interpersonal skills**, a **pro-active attitude and acting before complaints develop** are key. Quote: *“If staff see or hear guests with a problem, it is important that they do not ignore this but act and approach the guests, ask them what the problem is and try to prevent situations from developing into a complaint”* (Accommodations, nr. 2). **Dealing with aggression** was also mentioned. **Knowledge of laws affecting the sector and customer rights** is very important, according to one respondent.

One interviewee considers **passion** for one’s work as the main quality he is looking for when hiring people at all levels. Education should pay attention to values - skills are nothing if there are no values underneath. Passion for what you do, looking out for and taking care of each other (colleagues and guests) are main qualities for him.

Knowing how to **deal with people from various cultural backgrounds** is of increasing importance in the globalising world. Not only visitors are becoming more diverse with numbers of international guests growing but also on the work floor larger numbers of staff with diverse backgrounds can be found. For the museum, **diversity** is a focus already. This covers a wide range from providing better access for people in wheelchairs; large letter maps for those with bad eyesight; developing tours and programs for deaf and blind people, for people with dementia, for gay people, for lonely elderly people or for those who were colonized by the Dutch - all to create a better understanding of today’s world. In 2017 the museum installed a “coordinator inclusivity” whose focus area is making the museum more accessible to people from all walks of life.

However, most small entrepreneurs do not seem to be really engaging with accessible tourism, gender equality or diversity issues. One interviewee recognizes the growing importance of these topics but thinks it will take a long time before all entrepreneurs in this sector will pay attention to these issues.

In order to deal with international guests, **language skills** are important. English is necessary but all attractions mentioned that they receive large numbers of **German** visitors. Staff not only need to know that they are quite different from Dutch guests in some respects; they also need to be able to communicate with them in German. They see it as problematic that fewer people are speaking German; interviewees do not believe that translation apps will be a substitute, especially in a time when personal service is seen as key.

With growing numbers of international guests, the need for **cross-cultural communication skills** is also growing in order to communicate in a proper manner with German, other European and Asian / Chinese (mentioned twice) guests.

The museum respondent would like to see a **quality certificate for (museum) guides** since professionalization and personalization will be crucial for this occupation.

All interviewees mentioned **collaborative skills** as increasingly relevant; many organizations in this sector are not very hierarchical, meaning that working together to get the job done is important. In this respect, loyalty to each other, willingness to share one’s thoughts and ideas, giving and receiving feedback were also mentioned. Also, working together in digital ways (in shared documents, or on-line teams)

The respondents working in the accommodation sector consider the following social skills (i.e., personal-, communication/cultural-, and diversity skills) skills as the most important in ten years’ time:

The main requirement, today and in the future, will be **service or hospitality skills / customer orientation**. For one large hotel chain, this is the main criterium for selecting staff; educational background is not that important; a hotel school or hospitality or tourism education at university or vocational level is not a necessity,

not now and not in the future. Knowing what your customers need and want and how to provide for this, letting them enjoy their stay, and showing **respect** are skills that are increasingly rare but still necessary in the future. With increasing individualization, every person wants to be met with an **individual (or personalized) approach, in a polite manner**. This might be **less formal** than today (but that is also part of personalized service). Having the **right social attitude** is perhaps more important than having the right educational background or specialised knowledge.

At the same time, people with this attitude are increasingly difficult to find. Young people are not really interested in these kinds of jobs right now. It has maybe to do also with **a lack of interpersonal skills**: relating to other people outside of your own circle of friends, knowing how to have a conversation. Interviewee sees this as increasingly challenging for young people; they may be whizz kids when it comes to on line activities and social media but engaging in a face to face conversation seems very difficult for most students today.

Also mentioned were **emotional intelligence, creating memorable experiences, authenticity, listening skills, ethics, more diversity** (especially in management teams), transparency, matters of security, privacy.

Language skills: English is required by all; more languages are better (depending on the location of the hotel). **Cross-cultural competencies** are seen as important; being able to respectfully interact with and know more about **Chinese and Indian guests** and their cultures will probably become more important in the next ten years.

The respondents working in the food & beverage sector consider the following social skills (i.e., personal-, communication/cultural-, and diversity skills) as the most important in ten years' time:

All interviewees agree that **excellent service / hospitality skills** and **creating memorable** (culinary and other) and **personalized experiences** for the guests are core skills today and probably even more so in the future.

Important in this respect are: **people skills** (being able to deal with people from all walks of life, from diverse cultural backgrounds, gender and ages), **body language, listening skills, service with a smile, being able to surprise guests** (in a positive way), **exceeding expectations and meeting quality standards**.

However, several interviewees also noted that service and social skills are **difficult to teach**; learning by doing and following the example of supervisors and managers are rated as very important. But hospitality is also about **attitude, personality, and charisma**.

One interviewee suggested setting up **mentoring programmes** for developing social skills; conversations between older and younger people can be very constructive in this respect and structural mentoring creates a different dynamic around social skills and communication.

One interviewee mentioned that **being a generalist** in a company is the best social skill one can have. Generalists have timeless skills that at the same time always evolve because of changing environments and digital landscapes.

EXTRA. A summary of relevant additional comments by interview participants.

Tour operators / travel agents:

Education is the umbrella and should focus more on learning young people who they really are and what they like. As soon as you understand who you are and can see how others are, you will be able to work in teams, innovate and mobilize changes within the organization.

Students/young people know best what they want. They can teach us what to promote and how to do so among young people.

Destination Management:

One interviewee mentioned that in ten years' time, a DMO could be more of a **cooperation**, a place where all stakeholders could be working together on destination management and making decisions related to strategy and approach together. This could happen on local and regional levels but also on a national level: a national cooperation of DMO's, main (commercial) attractions and other stakeholders such as the Dutch National Board of Tourism and Conferences (NBTC).

Attractions:

One interviewee would like to make a plea for better knowledge of:

- Local governments: how do they work; how do they impact enterprises in this sector; skills in lobbying / maintaining relations / cooperating with local governments and water authorities;
- Laws affecting the sector and juridical aspects of dealing with customers (being able to read and understand - the implications of - contracts, for example). Also, knowledge of environmental law and laws affecting the energy transition will become increasingly important.

Food & beverage:

One restaurant supports **Too good to go** (<https://toogoodtogo.nl/nl>), a green initiative to combat food waste by reselling left over food at reduced prices. Reducing the use of **plastic straws** also seems to be a hot topic currently. These initiatives are not so much about skills but more about having a **sustainable mindset** and keeping up to date with moods and trends in society in order to retain customers.

Accommodation providers:

On-line booking platform: Students need to know more about sustainability and certification as this helps them to oversee what the impact can be. The only way to create sustainable employees is to learn what the impact is and by knowing you can act on it. **A certification minor** in which students must assess a company's sustainable practices – for example, in destination management. Many current courses are designed for selling more and not so much about tourism behaviour, the impact of visits on the destination; overtourism; mobility, transportation et cetera.